

Item Request Module

The Item Request module is used to create item requests to advise those responsible for inventory in your organization, that supplies are needed for your department. This Chapter describes how to use the Web Work, Item Request module.

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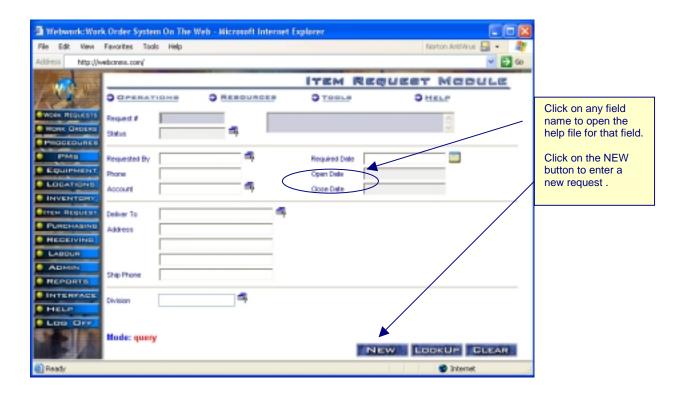
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1.1 Overview of the Item Request Module

The Item Requests Module is used to enter new Item Requests into the Web Work system.

Click on the ITEM REQUEST button on the left hand side of the screen to access the Item Request module.

When you enter the Item Request module you will be in Query mode as shown in the screen below:



The OPERATIONS DEPERATIONS, RESOURCES DESCRIPTIONS, TOOLS DEPERATIONS and HELP drop down menus contain the various features available in the Item Request module.



Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

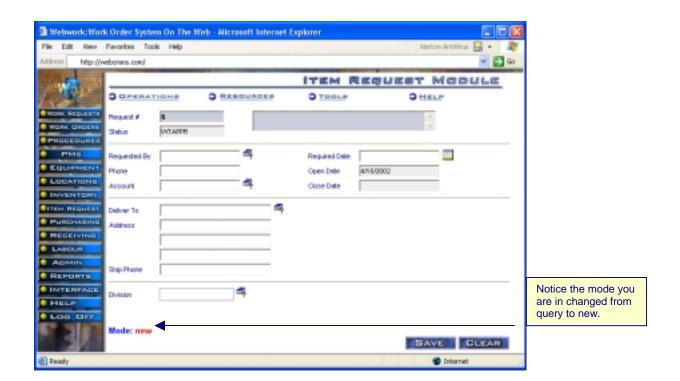
2.1 Creating Item Requests

When an item is required, create an item request to advise those who are responsible for inventory and purchasing in your organization that supplies are required.

2.1.1. To Create an Item Request

- Click on the ITEM REQUEST button access the Item Request module.
- Click on the PERATION menu at the top of the screen to display the drop down menu.
- Select New Request (Auto Number) or New Request from the drop down menu or click on the NEW button
 at the bottom right hand side of the screen.
- Pequest from New Request (Auto Number)
 New Request (Auto Number)

The following screen will open:



The Request #, Status and Open Date will be populated by the Web Work system.

- Enter information into the fields displayed on the screen. For information on field contents click on any field name – this will open a popup help window for that field name.
- NOTE: The Request #, Description and Open Date fields are the only <u>required fields</u>, all other fields are optional.
- Click on the SAVE button at the bottom right hand side of the screen to save the Item Request.
- You will then be in edit mode: you can edit and resave the Item Request, print the Item Request, or continue working in the module of your choice by clicking on the module on the right hand side of the screen.

3.1 Editing Item Requests

- Click on the ITEM REQUEST button on the left hand side of the screen to access the Item Request module.
- Click on the PERATION menu at the top of the screen to display the drop down menu.
- Perform an Item Request query to locate and open applicable item request. See Item Request queries for more information on performing item request queries.
- When you retrieve the item request you will be in edit mode.



Only New Item Requests can be edited. Item Requests that have been approved, closed, cancelled etc. cannot be edited.

- Make the necessary changes to the Item Request.



To change the status of a request click on the OPERATIONS menu and select Change Status from the drop down menu.

4.1 Creating Item Lists

When you have created an item request, you can add a list of items to that request using the Item List feature. You can enter individual line items or you can request a predefined list of items called kits.

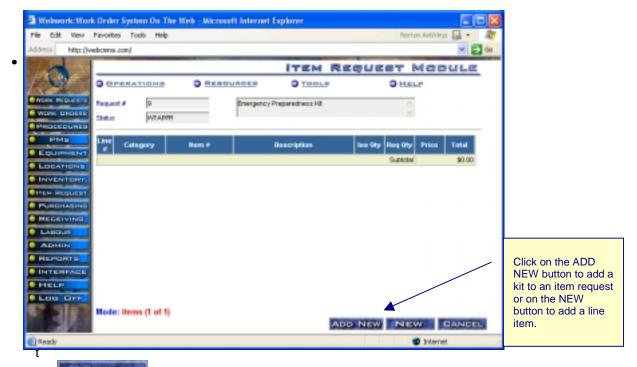
4.1.1. Adding individual line items to a Request

To add individual items to a request:

- Click on the ITEM REQUEST button access the Item Request module.
- Click on the Company menu at the top of the screen to display the drop down menu.
- Perform an Item Request query to locate and open applicable item request. See Item Request queries for more information on performing item request queries.
- Click on the EESCURGES menu and select Item List from the drop down menu.

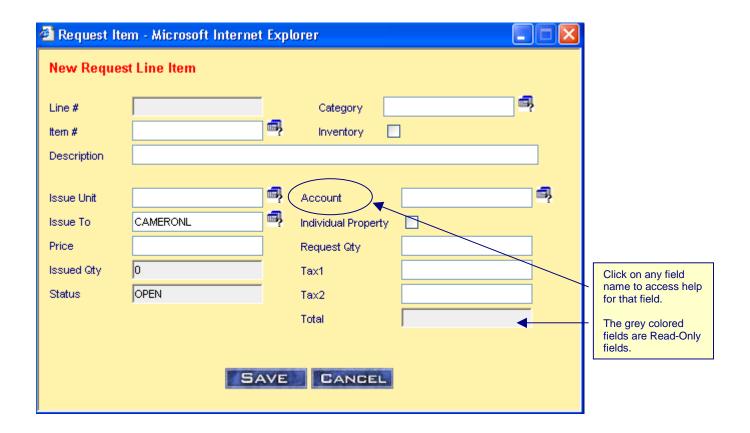


A screen similar to the one shown below will open:



ton to open the New Request Line Item screen.

A screen similar to the one pictured below will open:



- The Issue To, Issued Qty and Status fields are populated automatically.
- Line # field is read only.
- Enter an item category or click on the QUERY button to select a category from the Web Work database. IE: HVAC
- Enter an item number or click on the QUERY button of to select an item number from the Web Work database.
- When you select an item, the Description, Issue unit and Price fields populate with the information entered for this inventory item. These fields can be edited.
- Enter an account number if applicable or click on the QUERY button of to select an account from the Web Work database.
- Click in the check box beside the Individual Property field if applicable.

- Enter the Request Quantity.
- The Tax1 and Tax2 and Total fields will calculate automatically.
- Click on the SAVE button to save the Request item or on the CANCEL button to exit the Request Item screen without saving the item request. The item will be displayed in the table when you are in Items mode.

Click on the NEW button to continue adding line items or on the CANCEL button to return to the main item request screen.

4.1.2. Adding Request Kits to a Request

To add request kits to a request:

- Click on the ITEM REQUEST button access the Item Request module.
- Click on the PERATION menu at the top of the screen to display the drop down menu.
- Perform an Item Request query to locate and open applicable item request. See Item Request queries for more information on performing item request queries.

 RESOURCES
- Click on the RESQUECES menu and select Item List from the drop down menu.

 Details

 tem List
 Accounts
- Click on the ADD NEW ADD NEW button to open the Request Kit screen as pictured below.



• Click on the radio button beside the applicable kit name. The contents of the kit will be displayed on the lower portion of the screen.

Click on the OK button to select the kit, the EDIT button to edit the contents of the kit or the CANCEL button to return to the main item request screen.



See the Request Kits section of this manual for information on creating and editing Kits.

4.1.3. Editing Line Items

To edit a line item on a request:

- Click on the ITEM REQUEST button access the Item Request module.
- Click on the Company menu at the top of the screen to display the drop down menu.
- Perform an Item Request query to locate and open applicable item request. See Item Request queries for more information on performing item request queries.

 RESOURCES
- Click on the RESQUECES menu and select Item List from the drop down menu.

 Details tem List Accounts

 Accounts
- Click on the applicable Line #, Category, Item # or Description in the table to open the Edit Request Line Item screen as pictured below:



- Update the information as required.
- Click on the SAVE button to save the updated information or on the CANCEL button to exit the without saving the updated information.

4.1.4. Deleting Line Items

To delete a line item:

- Click on the ITEM REQUEST button access the Item Request module.
- Click on the DEFERATIONS menu at the top of the screen to display the drop down menu.
- Perform an Item Request query to locate and open applicable item request. See Item Request queries for more information on performing item request queries.

 RESOURCES
- Click on the applicable Line #, Category, Item # or Description in the table to open the Edit Request Line Item screen.
- Click on the DELETE button to delete the line item and close the Edit Request Line Item screen.

5.1 Request Kits

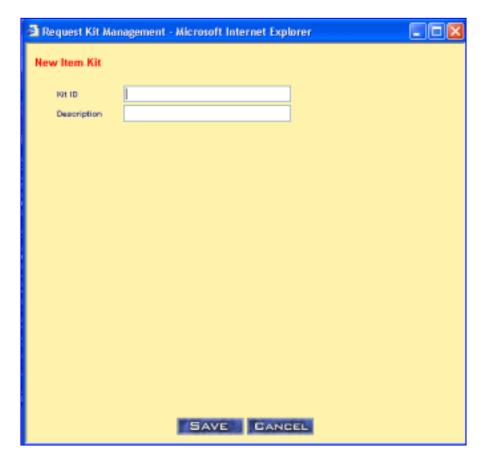
Request kits can be setup for groups of items that are requested on a frequent basis, to avoid having to reenter all of the individual items each time a similar item request is entered. Kits may be created for a specific type of job or supply request such as Tune Up or Uniform kit.

5.1.1. Creating Request Kits

To create a request kit:

- Click on the ITEM REQUEST button on the left hand side of the screen to access the Item Request module.
- Click on the PERATIPME menu at the top of the screen to display the drop down menu.
- Perform an Item Request query to locate and open applicable item request. See Item Request queries for more information on performing item request queries.

- Click on the RESULREES menu and select Item List from the drop down menu.
- Click on the ADD NEW ADD NEW button to open the Request Kit screen.
- Click on the on the NEW button to open the Request Kit Management window as pictured below:



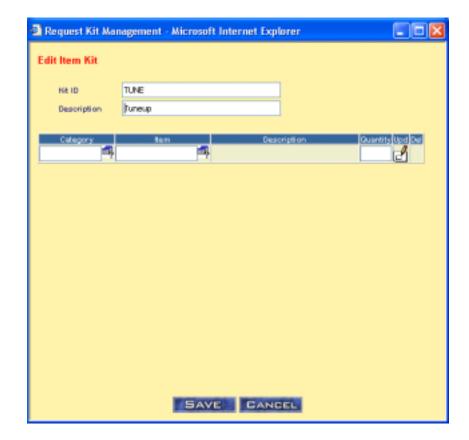
Enter a Kit ID and Description into the applicable fields and click on the SAVE button

SAVE

SAV



NOTE: You must have an Item Request open in order to access the Item Lists and the Request Kit Management screens.



The Edit Item Kit screen will open as pictured below:

- Enter a category or click on the QUERY button of to select a category from the Web Work database. IE: HVAC.
- Enter an item number or click on the QUERY button of to select an item number from the category you selected.
- The Description field will populate with the description of the item you selected.
- Enter the Quantity required.
- Click on the UPDATE button to add this item to the kit. The item will be displayed at the top of the table and the blank row will be displayed below it. Continue adding items to the kit as required.



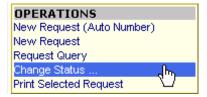
5.1.2. Editing Request Kits

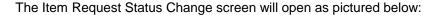
- Click on the ITEM REQUEST button on the left hand side of the screen to access the Item Request module.
- Click on the PERATION menu at the top of the screen to display the drop down menu.
- Perform an Item Request query to locate and open applicable item request. See Item Request queries for more information on performing item request queries.
- Click on the RESURGES menu and select Item List from the drop down menu.
- Click on the ADD NEW ADD NEW button to open the Request Kit screen.
- Click on the radio button beside the applicable kit name. The contents of the kit will be displayed on the lower portion of the screen.
- Click on the EDIT button to open the Edit Item Kit screen.
- To add items to the kit enter the Category, Line Item and Quantity and click on the UPDATE button. To delete items from the kit click on DELETE button at the far right hand side of the applicable row.

6.1 Changing the Status of a Request

To change the status of a request:

- Click on the ITEM REQUEST button access the Item Request module.
- Perform an Item Request query to locate and open applicable item request. See Item Request queries for more information on performing item request queries.
- Click on the PERATION menu at the top of the screen to display the drop down menu.
- Select Change Status from the drop down menu.







- Click on the down arrow to select the new status.
- Click on the SAVE button to save the status change or on the CANCEL button to exit the without updating the status.

7.1 Item Request Accounts

An item request can be assigned to one account or to a variety of accounts depending on the accounting practices of your organization. If only one account will be used simply enter the applicable account in the Account # field on the main Item Request screen.

7.1.1. To apply item request costs to more than one Account

- Click on the ITEM REQUEST button access the Item Request module.
- Perform an Item Request query to locate and open applicable item request. See Item Request queries for more information on performing item request queries.
- Click on the RESPURGES menu and select Accounts from the drop down menu.



The Item Request will open in Accounts mode.

Click on the Click on the NEW button to open the Add Item Request Accounts screen as pictured below:



- The Request # is populated with the request number entered on the Item Request.
- Enter an account into the Account field, or click on the QUERY button to select an account from the Web Work database.
- Enter the percentage of the Item Request that is to be charged to this account. Do not enter a percent sign, only the numerical value of the percent.
- The cost amount will be calculated automatically by the Web Work system.
- Click the radio button beside Keep Percentage or Keep Cost.
- Click on the SAVE button to save this account information and return to the item request in Accounts mode.
- You can click on the NEW button to continue adding accounts or on the CANCEL button to return to the main screen of the Item Request.



When you are in a RESOURCES menu item and want to return to the main item request screen, you can click on the RESOURCES button and select Details from the drop down menu.

8.1 Performing Item Request Queries

Find the Item Requests you have entered quickly and easily using Web Work's query by example Feature. For more information on Query by Example see the System Overview chapter of this manual.

8.1.1. To perform an Item Request Query

- Click on the ITEM REQUEST button on the left hand side of the screen to access the Item Request module.
- When you enter the Item Request module you will be in query mode. If you have been working in the Item Request module, you can click on the DEFERATIONS menu and select Request query to open the Item Request module in query mode.



A screen similar to the one shown below will open:



- Enter selection criteria into any of the fields.
- Click on the LOOKUP button to display a list of the records, matching the specified criteria.
- To open any of these Item Requests click the selection box on the right hand side of the applicable Item Requests in the table, and then click on the RETRIEVE button RETRIEVE at the bottom of the screen.

• The Item Requests will appear on the screen. If you selected multiple Item Requests, when you retrieve them an arrow will appear on the bottom left hand side of the screen.



Click on this arrow Next to move from one item request o the next.



Comparison operators such as: <, >, null, not null and % - wild card can be used to further define a query. See System Overview – Query By Example for more information.

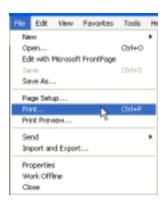
9.1 Printing Item Requests

You can print an individual Item Request or a batch of Item Requests that you have selected and retrieved.

9.1.1. Printing Individual Item Requests

To print only the Item Request that is open on the screen:

- Click on the PRINT button PRINT at the bottom right hand side of the screen.
- The selected record will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing.



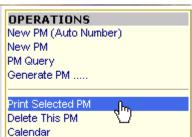
9.1.2. Printing Multiple Item Requests

To print a batch of Item Requests:

 Perform an Item Request query to open the desired Item Requests. See Item Request Queries for more information on performing Item Request

queries.

- Click on the PERATION menu and choose Print Selected PM from the drop down menu.
- The selected records will open in a new browser window.
- Click on File and select Print from the drop down menu
 To proceed with printing.

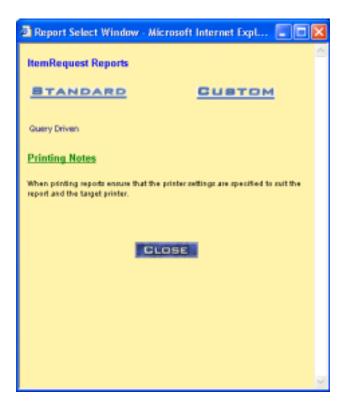


10.1 Item Request - Reports

To access Item Request reports click on the Transfer menu and select Reports from the drop down menu.



A screen similar to the one shown below will open:



Click on any of the Reports listed under Standard or Custom, to open them.



Only reports applicable to the Item Request module will be displayed. To view all reports, click on the REPORTS module button on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

10.1.1. <u>Creating Item Request Reports</u>

Reports cannot be created in the Item Request module. To create an Item Request report click on the REPORTS module button to access the report writer and create the report.

10.1.2. Printing Item Request Reports

Item Request reports can be printed from the Item Request module or from the Reports module.

To print a report in the Item Request module:

- Open the Item Request module.
- Click on the menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on its title.

The report will open in Preview mode.

• Click on File and select Print from the drop down menu to print the report.

11.1 Links

When you are in the Item Request module and select Links from the Transfer menu, the Web Work Create/Edit Links window will open as shown below.

You can view existing links or create new links using this feature.





You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.

For information on creating New links see the Links section of this manual.